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ITEM 3 Advisory Commission on Charter Schools Ross Valley School District Presentation re: RVC Charter Renewal Denial – February 11, 2021

RVSD Presenters:

Marci Trahan, Superintendent

Shelley Hamilton, School Board President

Rebecca Hayhurst, Ross Valley Teachers Association

Julia Wolcott, Director of Curriculum & Instruction

Sue Ann Salmon Evans, Legal Counsel



Ross Valley School District Presentation
for February 2021 ACCS Meeting



Collaborate • Learn • Inspire • Mentor • Believe

Diverse Learning Opportunities



Wade Thomas envisions a program that cultivates compassionate, inquisitive, reflective learners with the skills needed to live and work in the 21st Century



Students are educated in ways that reflect diverse learning styles, individual strengths, interests, and differentiated needs.



Education

1. Self-Discovery
2. Having Wonderful Ideas
3. Responsibility for Learning
4. Empathy and Caring
5. Success and Failure
6. Collaboration and Competition
7. Diversity and Inclusion
8. The Natural World
9. Solitude and Reflection
10. Service and Compassion



LUCY CALKINS & TCRWP COLLEAGUES

UNITS OF STUDY

Reading ♦ Writing ♦ Phonics



As Detailed in Our Materials...

RVC is Financially Unsustainable

- DEBT = \$835,000 - \$1,000,000
- Large (2.0-3.0) Debt Ratio

Substantial Fiscal Deficiencies

Section 47607(e) “... may deny renewal of a charter ... due to **substantial fiscal or governance factors,**”

Substantial Fiscal Deficiencies

- **RVC debt \$835,000 - \$1,000,000+**

\$ CDE Revolving Loan (+60K)

\$ Facility Construction Loan (355K)

\$ Private Loans (+100K)

\$ Revenue Anticipation (480K x2)

\$ PPP Loan (270K)

- **Staggering Est. Debt ratio 2.0 - 3.0**

Obfuscated Fiscal Information

- **Unverified Financial Projections:** Documentary Record does not Include Current Balance Sheets, Current Bank Statements, Loan Statements, or PPP Forgiveness Confirmation etc.
- **Contradictory, Materially Different Reports Submitted to RVSD and CDE:** Charter Application vs Revised Budget & Cash Flow for Appeal



Financial Expert Findings

Deborah Deal

- California Charter School Authorizers, Treasurer
- Fiscal Intervention Specialist for FCMAT 2007 - 2015, 2016 - 2018
- School District Chief Business Official (18 years)

“CDE concludes ‘RVC is fiscally sustainable’ without the application of financial metrics to support this claim.”

“...balance the budget on enrollment and average daily attendance not the wishful hope of donations”

“...projected 222 students... unattainable”

“Research on charter schools show that closures are primarily due to fiscal instability ... The unfortunate impact and disruption on students and their families when their school closes.”

As Detailed in Our Materials...

RVC Lacks Governance Oversight

Governance Issues

- **Unlawful/Misrepresentations** of Efforts to Obtain PPP Loan
- Repeated and Ongoing **Brown Act Violations**
- RVC Board Adopted a **False Statement of Facts** as its Resolution Supporting the PPP Loan
- **Conflict of Interest** & Improperly Applied for PPP Loan
- School Director **Falsified Loan Application**
- Key **Board Member Resigned** During Renewal Process

FCMAT Response

“...concerns about the governance process ...are more appropriately addressed by one or more of the following agencies:

- Marin County District Attorney
- U.S. Small Business Administration, Office of Inspector General”

Complaints have been filed with both agencies

As Detailed in Our Materials...

RVC Academic Assessment Data is

Inadequate

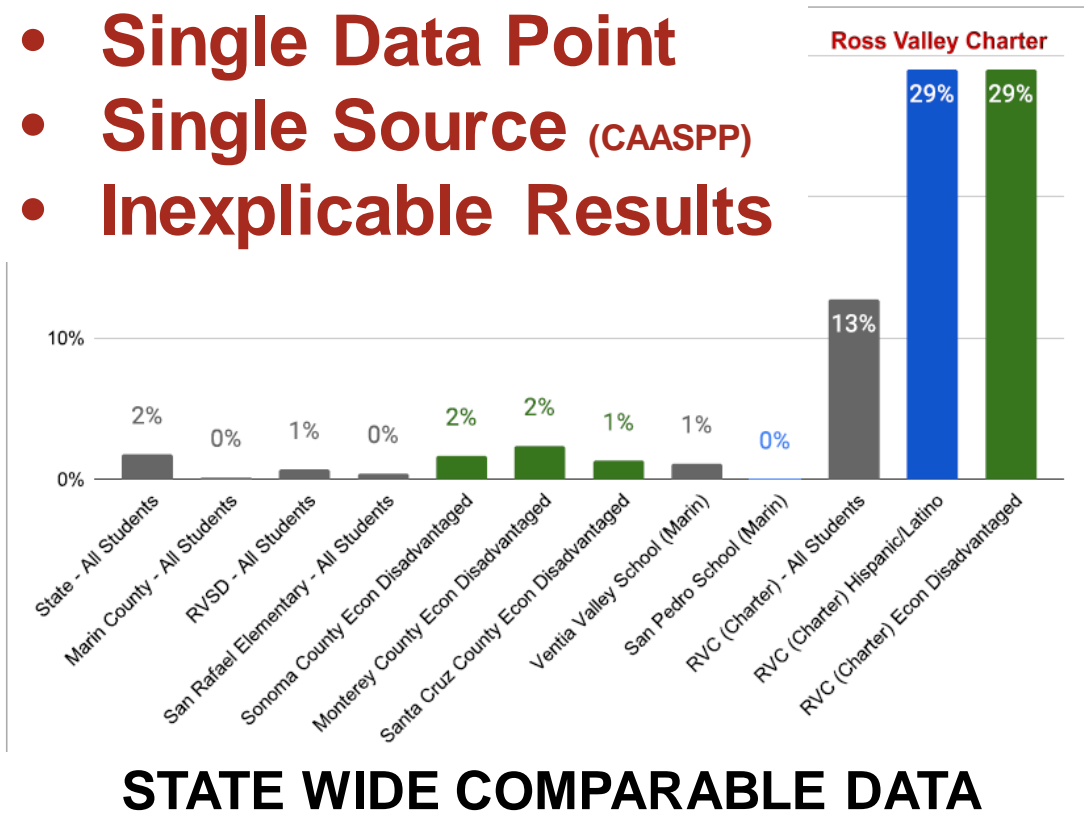
Unreliable

Suspect

Section 47607.2(b)(3) “**In addition to the state and local indicators**, the chartering authority shall consider **clear and convincing evidence** showing ... **academic** improvement data”

Inadequate, Suspect & Contradictory

- **Single Data Point**
- **Single Source** (CAASPP)
- **Inexplicable Results**



VS

From: Luke Duchene <luke.duchene@rossvalleycharter.org>
To: Juan Rodriguez
CC: Rebecca Homthal; Kristi Kimball
Sent: 5/29/2019 12:47:49 PM
Subject: Re: Dates for visit to Venetia Valley School

Hi,

“...working with a more diverse demographic ...obvious to them [teachers] that they don't have the tool kit to meet all of the needs present”

We have teachers who use a variety of strategies. They are now working with a more diverse demographic and it is now more obvious to them that they don't have the tool kit to meet all of the needs present.

“... results have not been as strong as they wanted ...”

Let me know if you have any other questions.

Warmly,
Luke

Insufficient & Inadequate Improvement Data

NOT CONDUCTING ASSESSMENTS

OR

WITHHOLDING ASSESSMENT DATA

District Finding: ... “a lack of complete and adequate academic assessment data.”

RVC Response: “RVC could not have turned back the clock to go back in time and implement another verified data assessment system.”

2015 Charter pages 113-115

Multiple Assessment Measures

Ross Valley Charter’s assessment plan includes multiple measures designed to monitor student progress over time. It includes baseline, formative, interim, and summative

- **Leveled Reading Assessments (baseline, formative, summative)**—All students in grades K-5 will be assessed at the beginning of the year, November,

- **Writing Assessments (baseline, formative, summative)**—A writing sample will be collected and assessed for each student several times a year. Students will be instructed on how to use writing checklists from the Lucy Calkins Units of

- **Mathematics Assessments (baseline, formative, summative)**—Throughout the year, student progress in mathematics will be measured using formal and informal formative assessments. Some of these assessments will be teacher-

aligned performance tasks for English-Language Arts and Mathematics, including Measures of Academic Progress from Northwest Evaluation Association (NWEA), Smarter Balanced Interim Assessments, The Center for Research and Evaluation at UCLA (CRESST), and West Ed. We will select one for ELA and

Chronic Absenteeism & Suspensions Is NOT Academic Data And is NOT “In Addition to” State/Local Indicators

- CDE relied upon Dashboard for absenteeism and suspension rate as “verifiable data” to support recommendation
- This data is *not* “measurements of academic performance” required by Education Code section 47607.2(c)(3)
- Does not support renewal as RVC Chronic Absenteeism is *Higher than RVSD & California*

NOTE: No Disaggregated Subgroup Data Reviewed by CDE

NOTE: CDE did not appear to have removed 8th-12th grade data from any RVSD and California statistics which would have inappropriately inflated comparable statistics

- Both RVSD and CDE Acknowledge Deficiencies in RVC’s Lack of Documented Suspension Procedures

Section 47607.2(b)(3) “**In addition to the state and local indicators**, the chartering authority shall consider **clear and convincing evidence** showing ... **academic** improvement data”

Without Clear And Convincing
Assessment Data There Is No Academic
Performance To Approve

As Detailed in Our Materials...

Equity Gaps (40%-75%)

EL, Hispanic/Latino, Econ-Disadvantaged

Disaggregated Data is critical to ensure Equitable OUTCOMES

Section 47607.2(b)(1) “... shall
consider the schoolwide
performance **and performance**
of all subgroups of pupils”

RVC Underperforms RVSD 80% of the time

CAASPP DATA TABLES FROM CDE RECCOMENDATION TO ACCS

Light Green = RVC Underperformance

Schoolwide

CDE-Chosen Comparable Schools, RVESD, California (Percent Meets or Exceeds Standards)

| School | 2017-18 | | 2018-19 | |
|---|---------|------|---------|------|
| | ELA | Math | ELA | Math |
| RVC | 70 | 64 | 83 | 73 |
| Manor Elementary | 66 | 53 | 74 | 58 |
| Wade Thomas Elementary | 87 | 85 | 83 | 81 |
| Brookside Elementary | 88 | 82 | 79 | 73 |
| Hidden Valley Elementary | 72 | 73 | 76 | 81 |
| RVESD | 78 | 70 | 78 | 69 |
| California | 50 | 39 | 51 | 40 |
| Note: 2017-2018 CA data added - was missing from CDE tables | | | | |
| RVESD 3-5th only | 78 | 74 | 78 | 74 |

English Learner

Pupil Subgroups for English Learner Pupils (Percent Meets or Exceeds Standards)

| School | 2017-18 | | 2018-19 | |
|---------------|---------|------|---------|------|
| | ELA | Math | ELA | Math |
| RVC | 0 | 9 | 33 | 25 |
| Manor Eleme | * | * | * | * |
| Wade Thoma | * | * | * | * |
| Brookside El | * | * | * | * |
| Hidden Valley | * | * | * | * |
| RVESD | 21 | 25 | 10 | 15 |
| RVESD 3-5th | 47 | 57 | 47 | 51 |

Latino/Hispanic

Pupil Subgroups for Latino/Hispanic Pupils (Percent Meets or Exceeds Standards)

| School | 2017-18 | | 2018-19 | |
|--------------------------|---------|------|---------|------|
| | ELA | Math | ELA | Math |
| RVC | 19 | 25 | 48 | 48 |
| Manor Elementary | 57 | 36 | 57 | 50 |
| Wade Thomas Elementary | 79 | 84 | 88 | 64 |
| Brookside Elementary | * | * | 55 | 73 |
| Hidden Valley Elementary | 46 | 57 | 52 | 70 |
| RVESD | 60 | 53 | 60 | 54 |
| RVESD 3-5th only | 62 | 64 | 63 | 63 |

Socioeconomically Disadvantaged

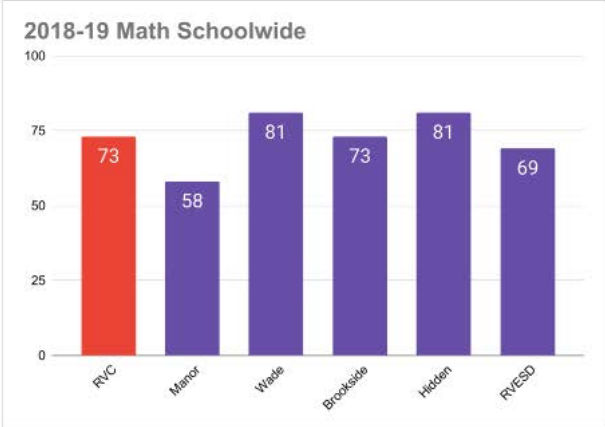
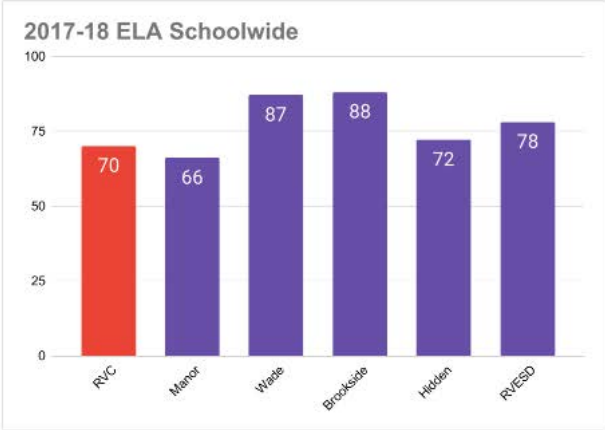
Pupil Subgroups for Socioeconomically Disadvantaged Pupils (Percent Meets or Exceeds Standards)

| School | 2017-18 | | 2018-19 | |
|---------------|---------|------|---------|------|
| | ELA | Math | ELA | Math |
| RVC | 18 | 29 | 47 | 37 |
| Manor Eleme | 38 | 48 | 63 | 38 |
| Wade Thoma | * | * | 62 | 57 |
| Brookside El | 69 | 69 | 79 | 73 |
| Hidden Valley | 50 | 41 | 31 | 50 |
| RVESD | 52 | 42 | 49 | 36 |
| RVESD 3-5th | 53 | 52 | 54 | 44 |

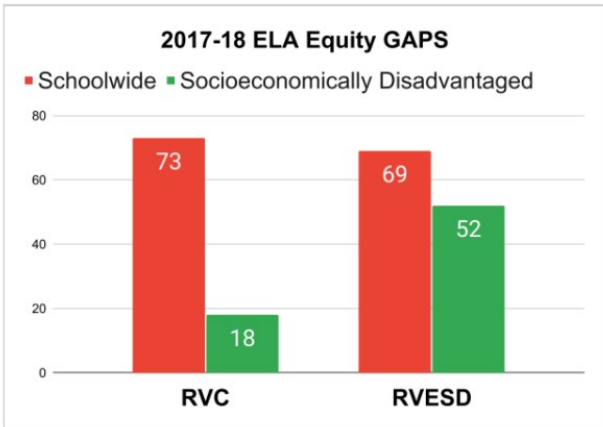
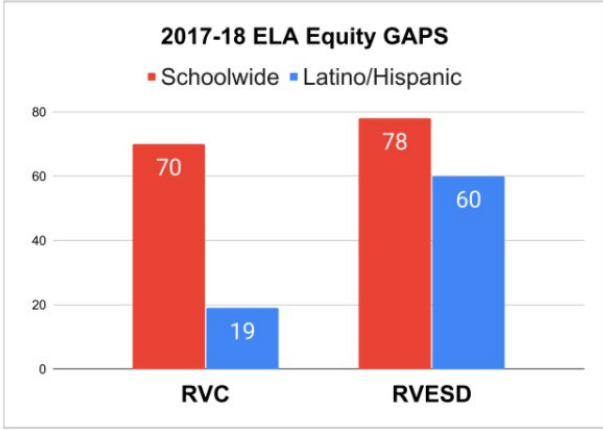
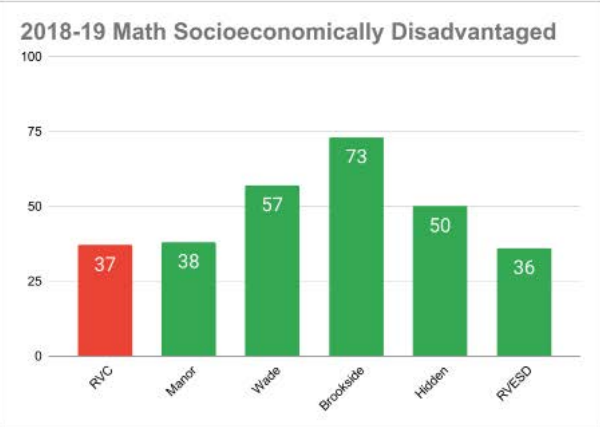
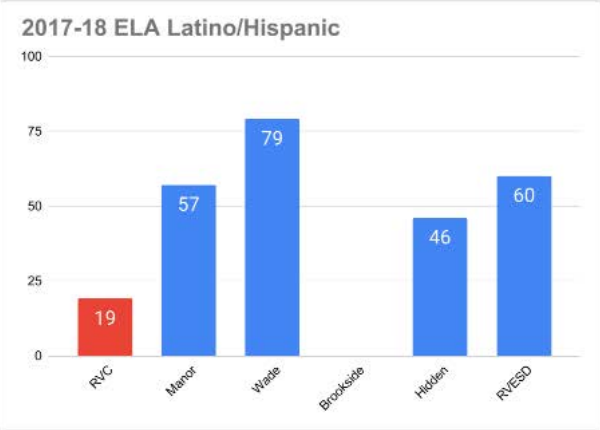
Equity Gaps in CDE Report Data

"Whitewashed" Schoolwide Data (CDE Data)

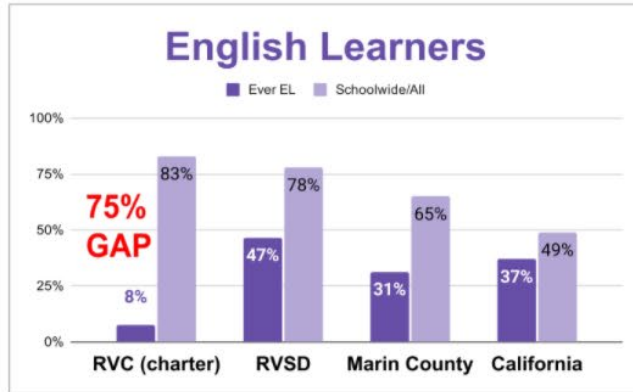
All data: Percent Meets or Exceeds Standards



Disaggregated Reality (CDE Data)



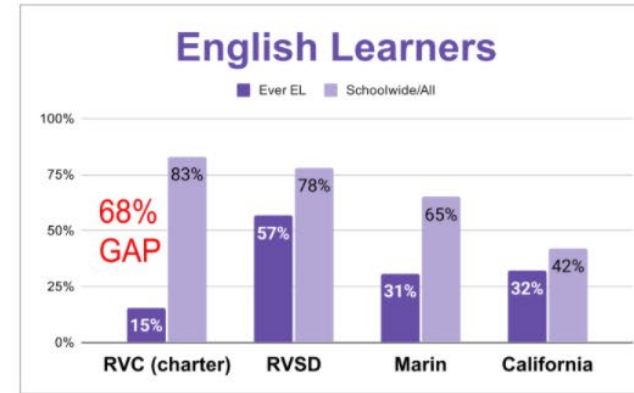
Equity Gaps & Disparities in EL



RVC Gap is:

44pts larger than RVSD

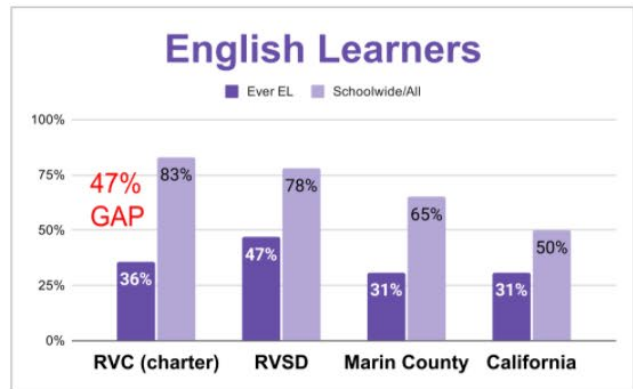
41pts larger than Marin County



RVC Gap is:

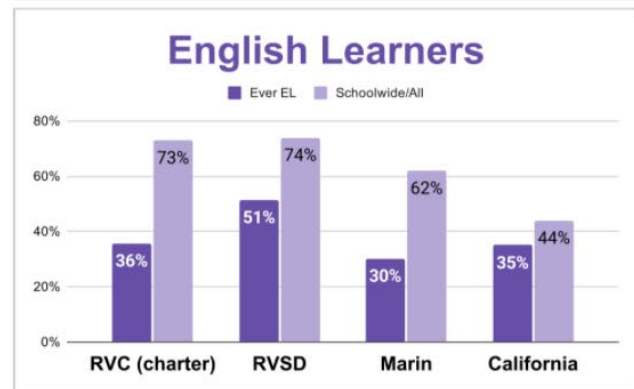
47pts larger than RVSD

34pts smaller than Marin County



RVC Gap is:

16pts larger than RVSD



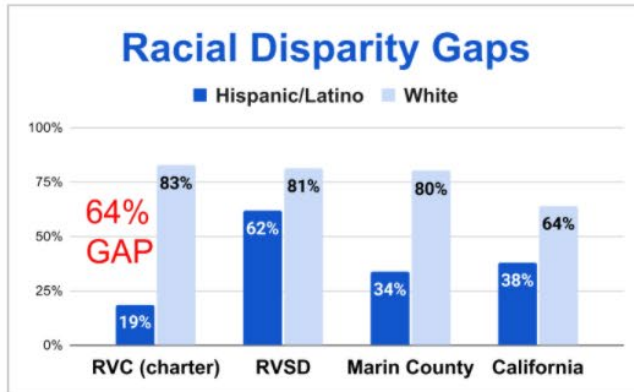
RVC Gap is:

14pts larger than RVSD

RVC Is NOT Supporting Learning Needs

English Language Arts

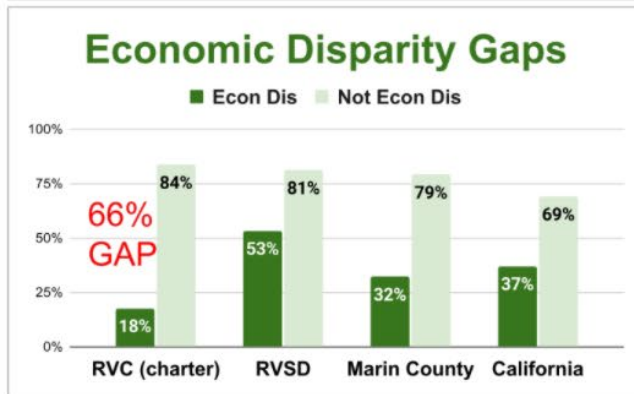
% Met or Exceeded Standards



RVC Gap is:

45pts larger than RVSD

18pts larger than Marin County



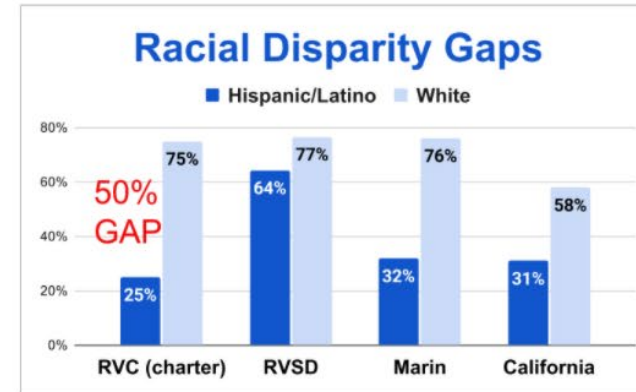
RVC Gap is:

38pts larger than RVSD

19pts larger than Marin County

Math

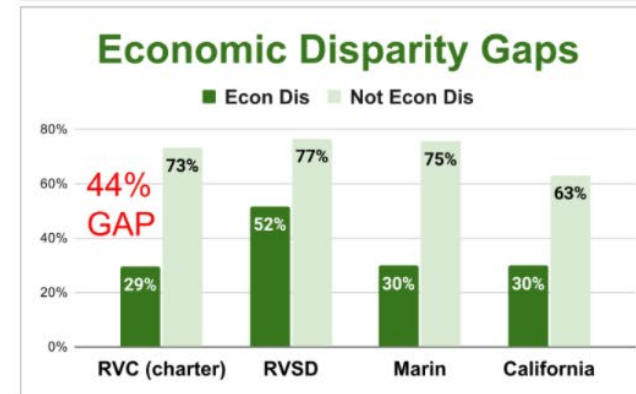
% Met or Exceeded Standards



RVC Gap is:

37pts larger than RVSD

6pts larger than Marin County



RVC Gap is:

19pts larger than RVSD

1pts smaller than Marin County

Diversity is Necessary but not Sufficient Equitable OUTCOMES Matter



Patricia Rucker, SBE
Board Member
RVC 2015 Charter
Approval Meeting

“Yet I’m curious as I didn’t see you holding yourself accountable for the **outcome of those practices...**”



edjustice

2. FOCUS ON ACTIONS AND IMPACTS RATHER THAN
ATTITUDES AND INTENTIONS



Equity Statement (2019)

“... combat institutional discrimination and bias
(both explicit and implicit) and
eliminate disparities in

educational outcomes

based on socioeconomic status, gender, ...”

CDE Recommendation Report

“section 47607.2(b)(2) ‘... shall provide greater weight to performance measures of academic performance ...’”

RVSD Recommendation

All Performance Measures - With Special
Attention to Equitable Outcomes

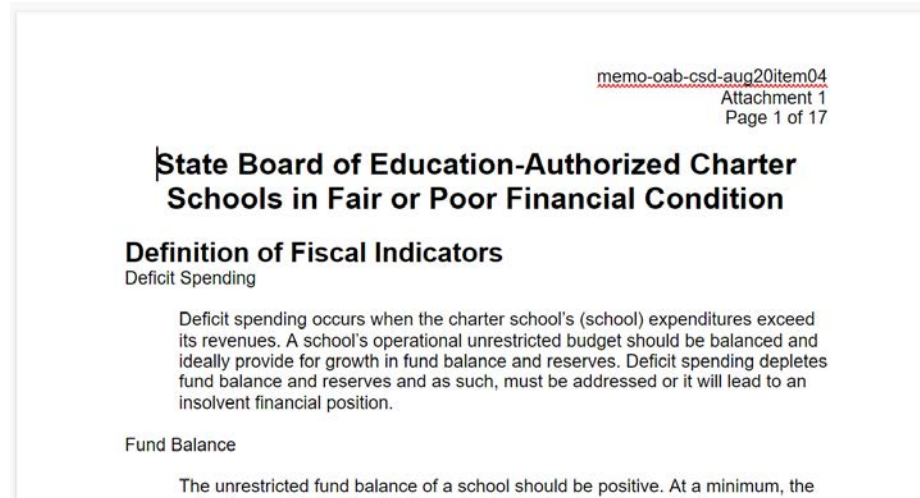
As Detailed in Our Materials...

**CDE Recommendation is
Unsubstantiated
Lacks Factual Analysis
Violates Education Code**

Serious Procedural Violations on Appeal

- **State review is limited to the record and *may not ignore the District's findings*** – to do so is an abuse of the State's discretion
- **Presumption of Correctness** - CDE has not refuted any of the District findings but rather has violated the statutory process by ignoring the findings and the supporting evidence
- **CDE's data analysis does not comport with sections 47605, 47605.9, 47607, or 47607.2** – there is no presumption of approval for a middle performing school that violated the law and its charter
- **CDE's consideration of materially different documentation** including a fully revised Budget/Budget Narrative, **violates section 47605(k)(2)(B)** and **mandates remand**

Lacks Analysis of SBE's Own Financial Metrics and Indicators Based Upon Documented Validated Information



Attachment 2: State Board of Education-Authorized Charter Schools Financial Highlights 2018–19 Audit Report of Schools in Good Financial Condition

Created by California Department of Education, Charter Schools Division, August 2020

| State Board of Education (SBE) Charter (Term Expiration) | 2018–19 Second Principal Apportionment (P-2) Average Daily Attendance (ADA) | 2018–19 Attendance Ratio (P-2/Enrollment) | 2019–20 First Principal Apportionment (P-1) ADA | 2019–20 P-2 ADA | Working Capital Ratio (Current Assets/Liabilities) | Debt Ratio (Total Liabilities/Assets) | Net Operating Surplus or (Deficit) | Ending Fund Balance |
|--|---|---|---|-----------------|--|---------------------------------------|------------------------------------|---------------------|
| Academia Avance Charter (June 30, 2020) | 367.4 | 94 | 310.01 | 308.36 | 0.63 | 0.85 | \$ 230,540 | \$ 237,102 |
| Audeo Charter II (June 30, 2021) | 281.03 | 123.3 | 279.74 | 297.94 | 5.44 | 0.12 | \$ 190,309 | \$ 1,863,336 |
| Baypoint Preparatory Academy * Closed Fall 2020 | 406.57 | 91.4 | 346.87 | 342.59 | 1.21 | 0.79 | \$ (914,009) | \$ 211,211 |
| Baypoint Preparatory Academy - San Diego (June 30, 2023) | 76.37 | 86.8 | 152.45 | 152.65 | 1.44 | 0.85 | \$ 177,102 | \$ 68,545 |

Lacks Factual Analysis under 47607.2

- **Performance of all subgroups of pupils**
- **Academic Data In addition to State and Local Indicators**
- **Clear and Convincing Evidence**

Materially Different Documentation Mandates Remand violates section 47605(k)(2)(B)

Ross Valley C
Multi-year Project
As of Sep FY2021
13

RVC Board Adopted Budget 11-12-20

RVC Budget Narrative

| | Year 1 2020-21 | Year 2 2021-22 | Year 3 2022-23 | Year 4 2023-24 | Year 5 2024-25 | Year 6 2025-26 |
|---|-----------------------|----------------------|-----------------------|----------------------|----------------------|----------------------|
| SUMMARY | | | | | | |
| Revenue | | | | | | |
| LCFF Entitlement | 1,616,068,171 | 1,853,245,188 | 1,853,105,188 | 1,855,789,188 | 1,855,645,188 | 1,855,645,188 |
| Federal Revenue | 8,301 | 67,819 | 67,468 | 65,752 | 65,506 | 65,506 |
| Other State Revenues | 291,234,279,038 | 53,278,540,403 | 56,778 | 56,778 | 56,778 | 56,778 |
| Local Revenues | 156,067,178,336 | 178,744,179,859 | 179,203,180,165 | 179,203,180,165 | 179,203,180,165 | 179,203,178,289 |
| Fundraising and Grants | 8,500 | 197,193 | 197,193 | 197,193 | 197,193 | 197,193 |
| Total Revenue | 2,201,416,233 | 2,490,700,255 | 2,494,619,255 | 2,497,203,255 | 2,496,959,255 | 2,496,959,255 |
| Expenses | | | | | | |
| Compensation and Benefits | 1,469,163,149 | 1,605,234,155 | 1,645,667,166 | 1,666,485,166 | 1,677,616,166 | 1,697,747,166 |
| Books and Supplies | 3,330 | 98,117 | 24,330 | 30,877 | 28,012 | 35,231 |
| Services and Other Operating Expenditures | 67,846,379,954 | 76,768 | 37,260 | 37,759 | 38,265 | 38,724,38,779 |
| Depreciation | 686,452,889,939 | 681,212,672,195 | 670,910,832,884 | 681,373,994,473 | 686,549,937,655 | 686,549,937,655 |
| Other Outflows | 586,107,611,562 | 29,695,20,793 | 60,637,58,043 | 67,315,58,043 | 63,994,56,942 | 63,994,56,942 |
| Total Expenses | 2,158,747,211 | 2,434,734,244 | 2,429,882,233 | 2,436,722,244 | 2,457,551,244 | 2,486,319,244 |
| Operating Income | 42,669,130,144 | 55,966,77,279 | 64,637,113,320 | 60,482,95,34 | 39,408,90,0 | 10,641,78,052 |

The attached 2020-2026 six-year budget and five-year cash flow projections are based on three years of operating experience as well as the collective experience of EdTec which provides back office business services to RVC.

EdTec is a social venture founded in 2001 to develop, support, and advance quality charter schools. EdTec has built an excellent a strong reputation throughout California among charter schools and their authorizers for providing the highest quality business services and operations support. EdTec's team provides expertise and support to more than 350 charter schools across a comprehensive range of services.

~~EdTec's economies of scale deliver experienced personnel specializing in various areas of school finance and operations, including budgeting, cash flows and forecasts, accounting, payroll, accounts payable, financial reporting, compliance management and the development of benchmarks and best practices.~~

In part due to these services, both of RVC's operating audits by CLA auditors have had no findings.

The narrative below lays out the assumptions on which this budget is based. The budget reflects a positive operating income in each of the five-six years, resulting in an ending balance at the end of fiscal year 2025-26 that is 24.35% of that year's expenses, having started with an 44.12.7% reserve of \$269,519 at the end of 2019-20.

Staffing and Benefits

All six years include ~~salaries a salary and benefits expense~~ for a 24-18 hour per week-, 52 weeks a year certificated teacher to work as an intervention teacher and English Language Development specialist, as well as ~~three-two~~ and a half instructional classroom ~~aids/aides~~.

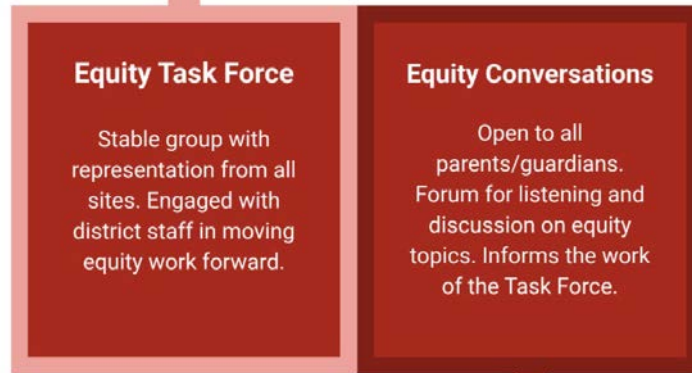
In 2020-21 the instructional budget includes three non-certificated part time instructors: a PE instructor for 18-26 hours/week and music and art teachers at 9 hours per week. In 2021-22 and thereafter weekly music instruction hours increase from 9 to 12-18 hours.



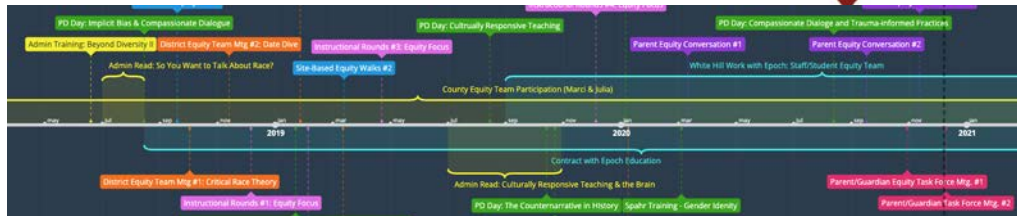
Collaborate • Learn • Inspire • Mentor • Believe

Equity at the Center

Parent/Guardian Equity Task Force



5 Years of Hard Work



Declaración de la misión de equidad racial de RVSD RVSD Racial Equity Mission Statement

“... all students feel a sense of belonging, are respected and celebrated for their individual differences, and are empowered to thrive socially, emotionally, and academically.”

“Ross Valley School District parents, guardians, students, staff, and board trustees, in partnership, will create policies to disrupt systemic racism ... engage in anti-racist actions that build a vibrant, inclusive learning community.”

- **20% Budget Allocation to EL etc. Student services, PD, etc.**
- **3 Dedicated FTE**